

TAB

RECORDS MANAGEMENT TRAINING PROGRAM

LAST WEEK at the first meeting of this program Mr. Emmet Leahy and Mr. Herbert Angel gave us the necessary philosophy and background for the job ahead.

Mr. Leahy spoke from the viewpoint of a man who had analyzed the records problem in government and carried the recommendations into effect in industry.

The records job, he said, is one of

technical know-how	10%
service	45%
selling	45%

Those participating in a 16-hour course, he estimated, can hope to get the 10% technical know-how, with perhaps some "flavoring" of the other two concepts.

Other facts he brought out:

1. Industry and government both equally guilty of accumulating square miles of records
2. Records centers using specially designed cardboard boxes are best medium for service - and the cheapest

Mr. Angel spoke from the viewpoint of a man who is heading up the implementation of the Hoover Commission report in government.

Recommendations of Commission	Achievements to date
Legislative Action	Federal Records Act of 1950
Guidance by a central staff agency	National Archives and Records Service, GSA
Records program in each agency	All agencies have started records program

He pointed out that there are three aims of a records program: (1) to check creation of records; (2) to establish schedules of disposal; and (3) to gain space.

For practical reasons, his group has had to start with the third point and work backward. The end of June, 1954, was set as the deadline date for agencies to have their records substantially scheduled. By the close of 1952, 87% of the agencies had submitted their records schedule.

In their role of advisory agency, he said, their emphasis is now on guidance in the maintenance and creation of records. They are now developing several "how to do" publications to assist agencies in this part of the program.

TODAY'S MEETING moves from the background-giving area to one where the speakers will discuss problems which strive to put the Commission's aims into effect.

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AT THE FIRST MEETING three objectives of a records management program were discussed:

- creation of records
- maintenance of records
- disposition of records

THE SECOND MEETING was keyed toward the third objective - space.

Mr. Alldredge pointed out that GSA has established fourteen Federal Records Centers for the use of all agencies. The most economical way to store records has proven to be through the use of specially designed cardboard boxes on steel shelving. This method costs only \$28 a year for the storage of 60 cubic feet, constituting a savings of from \$70 - \$870 a year over some other methods. In addition, it is the most economical in terms of space utilization. Mr. Alldredge emphasized that records stored in this way are readily accessible, protected from fire, and guarded according to security regulations.

The criterion which Mr. Alldredge gave for determining when to retire records was this: when a file drawer is used only once a month, that material should be retired to a records center.

Mr. Young described the objectives of a records disposal program as being: (1) to insure that records of a continuing value are preserved, and (2) to dispose of records no longer being used. Both require attention to three problems:

- Decide - what must be saved; what can be destroyed
- Determine - disposal schedule
- Apply - schedule

The records control schedule should identify and describe the records clearly, as well as give instructions for their disposition. As a guide for use in identifying and disposing of records, GSA will soon issue new schedules for fourteen housekeeping-type records.

DISCUSSION IN TODAY'S MEETING will continue to center around the practical application of a records management program.

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THE THEME OF THE THIRD MEETING was the application of records management principles to office situations.

Mrs. Luttrell defined a records survey as "management analysis and planning applied to records."

Explaining the techniques utilized in making surveys, she detailed the five essential steps a records analyst should follow:

1. Preliminary planning
2. Collecting survey data
3. Analyzing data and formulating recommendations
4. Preparing the report
5. Installing the recommendations

Mrs. Luttrell indicated that the analyst's job is never complete until the recommendations are installed; and she added that a post audit of the project is a desirable follow-up.

Miss Sheppard pointed out that the many manhours involved in the creation of correspondence result in a high per-letter cost in government - from 75¢ to \$3.00. She emphasized that savings in both time and money can be made through the effective application of:

1. Standards and Guides - such as correspondence style manuals; form letters; guides for effective letter writing; automatic typewriters
2. Training - including not only refresher courses for the clerical staff but courses for the administrative staff; on-the-job training at all organizational levels; specialized training
3. Systems and Procedures - for example, using a correspondence guide when writing letters instead of dictating
4. Control - to eliminate unnecessary copies; maintain flow within channels; insure proper security

Miss Sheppard announced that GSA is preparing a series of booklets which all agencies may use as guides in their correspondence management programs.

IN TODAY'S MEETING, and in our future meetings, the discussion will be slanted toward the implementation of a records management program in the Agency.

STATINTL

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THE FOURTH MEETING continued with the discussion of records control principles and their application to the Agency.

██████████ pointed out that since forms become records as soon as they are created, we should constantly strive to eliminate unnecessary ones and carefully analyze the need for new ones. Forms account for 2/3 of the Government's printing bill per year; yet the printing of forms is only 1/10 the cost of handling them.

The objectives of a forms control program, he explained, are to:

1. Abolish unnecessary forms
2. Simplify and improve the design of forms
3. Consolidate and standardize forms
4. Effect improvements and simplifications of procedures
5. Effect economies in printing, distributing, and stocking forms
6. Assure periodic review of all forms
7. Facilitate control of records

STATINTL

██████████ described the work of the Printing and Reproduction Division by giving emphasis to specific Agency problems and accomplishments. He told of the extent of their facilities, explaining that they are equipped to do -

microfilming and photostating
ditto and stencil reproductions
off-set and letter-press printing
collating and binding

STATINTL

██████████ supplemented his talk with colored slides, which more graphically pointed out the facilities of the Division and the service it is capable of rendering the Agency.

THE DISCUSSION TODAY will center around additional facilities of the Agency that are pertinent to a records management program.

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STATINTL

IN THE FIFTH MEETING additional facilities of the Agency were described and their utilization in a records control program discussed.

██████████ stated that simple, efficient filing systems and control procedures are requisites of a sound records management program. As a step in that direction, an Agency filing manual has been developed - and is now being distributed. It will serve as the basic guide for implementing a records program in the Offices throughout the Agency.

He pointed out that the manual includes standards in the areas of:

1. Communications Control - the internal control and follow-up of all forms of correspondence
2. Records Maintenance - through
 - a. proper location of records facilities
 - b. standardization of filing equipment and supplies
 - c. types of files maintained
 - d. file classification plan
3. Reference Service - the withdrawal and return of record materials

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The test of a records program, ██████████ explained, is to be found in the service afforded operating officials through the reference area. But all the factors outlined in 1 and 2 are essential if the reference area is to provide prompt and efficient service.

██████████ explained the principles and advantages of the electric accounting machine method, and how these methods may be adapted to record keeping problems. He augmented his talk with colored slides which showed the principles of machine accounting. He stressed the advantages of machine operations over manual operations from the viewpoint of --

speed accuracy volume flexibility economy

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Although machine methods are not practical for every job, they are particularly effective and economical when the cards can be used for more than one project. With the aid of graphic charts, ██████████ showed how machine methods are now being applied to several vital Agency operations.

██████████ advised that the Machine Records Branch is equipped to handle all types of records requirements and that services are available upon request. A tour of the installation can be arranged for those who are interested.

TODAY'S DISCUSSION will offer further assistance to the Area Records Officers in inaugurating their records programs.

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THE SIXTH MEETING'S discussion was devoted primarily to the preservation of necessary records - why and how - in the Agency.

██████████ defined Vital Materials as being those specific records which would be absolutely essential to reestablish the Agency and which, therefore, must be preserved. He pointed out the necessity on the part of management to provide a continuous program for preserving these records, especially in such unsettled times as we are living today.

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The procedure for depositing Vital Materials, ██████████ explained, falls into the five progressive steps of:

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selection transferring coding maintenance accounting

██████████ continuing with the discussion of vital materials, described what actually happens to the records after they are sent to a repository. He explained - (1) how an adequate amount of safe, secure storage has been provided; (2) how the materials are processed for storage; and (3) how the planning has included the providing of service in case of disaster.

STATINTL

██████████ spoke on the making of a disposition plan, and showed how such a plan involves the preparation of records control schedules and records disposal schedules. He pointed out the necessity of a disposition plan in controlling the orderly retirement, disposal, and preservation of Agency records. He also outlined the details of obtaining authority from the National Archives and the Congress to destroy records as they outlive their usefulness.

The concluding part of the program consisted of a Department of the Army film. The film showed a records program - especially the disposition phase - in action in the Army.

IN TODAY'S MEETING the discussion will continue to be keyed toward the practical application of a records management program in the Agency.

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IN THE SEVENTH MEETING the discussion continued to amplify the assistance that is available to the operating people through a records management program.

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██████████ explained that microfilming is a modern technique which, if judiciously applied, can contribute materially to the success of a records management program. However, he warned that its effectiveness must not be overemphasized. Although space is released by the filming of records, microfilming is an expensive process and this cost factor must be carefully weighed. ██████████ pointed out that extreme care should be taken in evaluating all proposed filming projects in order to avoid high cost projects and indiscriminate microfilming.

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██████████ told of the current plans for constructing and operating a records center in the Agency. He graphically illustrated his discussion with photographs of the records centers of Atomic Energy Commission and the Department of the Navy. In the views, he called attention to pertinent features of good, safe storage and of fast service. Each of these areas, ██████████ explained, is being given special consideration in the proposed Agency center.

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██████████ explained the significant part played by the management of reports in an overall records management program. The coordinated control of reports, he stated, will result in fewer and better reports and at less cost to the Agency. He stressed the fact that reports should be analyzed from two viewpoints - using the information and preparing the report.

██████████ further pointed out that the success of a reports management program depends not only on the need for such a program but also on the desire of Agency personnel for the services it can render.

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Mr. Peel emphasized the importance of a records management program to the Agency from the standpoint of money saved. In addition to the savings in actual dollars and cents, he stressed that such a program leads to greater efficiency of operations. Records are merely tools of management. But to be of any value, a tool must be used, it must be an aid to doing something better, and it must justify its expense. We should, therefore, Mr. Peel continued, critically examine all our "record" tools and streamline our operations according to the findings.

TODAY, in concluding this series of meetings, attention will be focused on your tasks as area records officers.